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March 2025

# CII Level 6 Award in Regulated Pension Transfer Advice Qualification specification



Thank you for considering study with the CII. This specification summarises the purpose and the content of this qualification to help you decide whether it meets your learning needs.

The qualifications section of the CII website, unit syllabus documents and CII policies provide further detail on the features summarised here.

## Qualification overview

The **CII Level 6 Award in Regulated Pension Transfer Advice** develops the in-depth applied knowledge and practical skills needed by anyone seeking to advise on the transfer of safeguarded benefits, an increasingly important part of the advice process following the Government's pension reforms.

## Who is this qualification for?

This qualification is particularly appropriate for:

- Retail investment advisers seeking to undertake pension transfer work and become pension transfer specialists; and
- Retail investment advisers, paraplanners, technical consultants and those in financial planning support roles wanting to update their knowledge in this area.

## Benefits for individuals and employers

The Award, when combined with an RDR-compliant qualification for retail investment advice, satisfies the appropriate FCA qualification requirements for those wanting to undertake pension transfer activities.

This will enable you to meet the qualification requirements to practise in this area and expand your areas of expertise in your professional practice.

## Summary of content

The compulsory unit covers the implications of transferring between different types of pensions, the advice process and its priorities and regulations, and the appropriateness of pension transfers in a range of client scenarios.

## Important note – FCA qualification requirements

From October 2021, a qualification for retail investment advice (e.g. CII Level 4 Diploma in Regulated Financial Planning), in addition to a specialist qualification (e.g. CII unit AF7 / CII Level 6 Award in Regulated Pension Transfer Advice), has been required in order to meet the qualification requirement.

Please check our qualification webpage and the FCA Handbook and publications for details of CII qualifications and FCA requirements. We offer [further advice on legacy qualifications and the new rules](#).

# Entry and professional completion requirements

## Entry requirements

There are no entry requirements for this qualification. However, it is assumed that you will have already completed an RDR compliant qualification for retail investment advice.

## Additional completion requirements

There are no additional completion requirements for this qualification.

# Qualification structure

You will need to complete the following unit.

(AF7) [Pension transfers](#)

*20 CII Credits*

# Learning and assessment

## Learning materials provided

For this qualification, students typically have access to the following materials as part of their enrolment:

- Study text (digital only or printed and digital) with online updates
- Online support including exam guide via RevisionMate
- Further reading suggestions

Please see the qualification and unit website for further details and prices for current enrolments and any additional resources. Indicative fee information is also included in UK currency in the fee section in this specification.

## Study time

Specific study time guidelines are provided for each unit on its webpage and in the CII qualifications brochure.

The notional Ofqual 'Total Qualification Time' for this qualification is 100 hours\*. This represents the time a student might typically take to complete the qualification.

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\*'Total Qualification Time' is a term that awarding organisations are required by Ofqual (the qualifications regulator in England) to use to describe the size of qualifications.

## Assessment format

AF7 is assessed by on-screen written exam.

The qualification award will be graded pass/fail.

The nominal pass mark is 60%. Please note, pass marks may vary from examination to examination to take account of the relative difficulty of examinations presented to candidates, ensuring that the pass standard remains constant.

We regularly update our qualifications, units and assessments to maintain industry relevance and assessment standards.

## Further information on learning and assessment for each unit

Please ensure that you refer to the individual unit syllabus for unit-specific details:

- learning outcomes and assessment criteria
- further reading and resources
- important notes, such as the tax and legislative position that will be assessed

This is available on each unit webpage, accessible from the qualification webpage:

[www.cii.co.uk/learning/qualifications/award-in-regulated-pension-transfer-advice-qualification](http://www.cii.co.uk/learning/qualifications/award-in-regulated-pension-transfer-advice-qualification)

Please also select your unit from the webpage to find out about any unit updates.

## Important assessment policies

Details of terms and conditions which apply to candidates entering for assessments with the CII are set out on the CII website. By entering any assessment with the CII, you agree to be bound by these terms and conditions and our [assessment policies](#).

## Fair access to our qualifications

The CII acts at all times to ensure that no unfair barriers apply to those seeking to gain the qualifications it offers. If, due to disability or illness, you may require adjustments in order to access an assessment, please read the [Qualifications accessibility and special circumstances policy and guidance](#) and contact the CII Customer Service team as soon as possible to discuss how we can meet your needs.

## Qualification Fees

We are required by our regulators to publish a standardised set of qualification fees and these are set out below. The best way for you to calculate the cost of completing a qualification is by looking at the unit shop pages for the units you are planning to take.

The terms, 'Standard Qualification Fee', 'Package fee' and 'Associated Learner Fees' are defined by our regulators, Ofqual, CCEA and Qualifications Wales, to create consistency between UK-based awarding organisations. It is a regulatory requirement to illustrate our pricing in this way. The total price paid will depend upon specific pathway chosen, membership status and local currency. Further pricing information by unit and component relevant to your specific pathway remains available on your qualification webpage. The table below describes what each fee indicates.

Fee	Description
Standard Qualification Fee	The standard total fees payable for the assessment elements of the core qualification throughout a typical course of study.
Package Fee	Where applicable, the total of the fees payable for mandatory learning materials elements of the core qualification throughout a typical course of study.
Associated Learner Fees	Additional fees for optional services payable: <ul style="list-style-type: none"> <li>• at the learner's discretion.</li> <li>• in specific circumstances only; or,</li> <li>• for additional study requirements prior to completing this qualification.</li> </ul>

Please note these fees are based on non-CII members taking the qualification in the UK, following a typical route to completion, using digital only options where available. Costs may vary for those residing outside the UK and depending on the route to completion. Substantial discounts are available to members and are detailed on the individual unit shop pages.

Standard Qualification Fee £233.00

Package Fee N/A

Associated Learner Fees

#### **Annual**

Non-Mandatory Annual Membership (per annum)  
(Assumes entry level membership) £84.00

#### **One off**

Digital Only Enrolment £182.00

Digital and Printed Enrolment £218.00

Audio revision £100.00

Study text update (Digital only) £98.00

Study text update (Printed and Digital) £116.00

For post results services prices, please visit the [Post results services webpage](#).






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